

Wisconsin Dept. of Revenue Electronic Real Estate Transfer Return - eRETR

Treasurer's Use of eRETR

Wisconsin Dept. of Revenue's Real Estate Transfer Web Page

<http://www.dor.state.wi.us/ust/retn.html>

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Wisconsin Department of Revenue

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Real Estate Transfer

Section 77.22(1) of the Wisconsin Statutes provides that "...submission of a completed real estate transfer return and collection by the register of the fee shall be prerequisites to acceptance of the conveyance for recording." All information on the transfer return is useful to the local assessor, other municipal and county officials and staff of the Department of Revenue who have a statutory responsibility in the administration of Wisconsin tax laws.

Electronic Real Estate Transfer Return (eRETR) Workshops

Filers

Online:

- Use [eRETR](#) (electronic Real Estate Transfer Return) **Begin a new return or restore a saved file.**
- [eRETR Instructions](#)
- [View filed eRETR](#) (need Receipt No., Value & Name)
- File [amended](#) PE-500x for eRETR correction or refund of recorded documents | [Instructions](#)

Paper:

- To obtain the paper Form PE-500 either:
 - call (608) 266-1961
 - make a request [online](#)
 - contact a [Register of Deeds Office](#)
- [Instructions](#) (PE-500a) for the paper Real Estate Transfer Return (06/05)
- File [amended](#) PE-500x for Return correction or refund of recorded documents | [Instructions](#)

Government

Online:

- [eRETR Government Officials web site](#) - to view or process eRETR
- [Treasurer's Transmittal](#) Spreadsheet--Form P-520 (Excel format)
- Treasurer's Transmittal Spreadsheet--Form P-520 ([Older versions of Excel](#))
- [Pay by EFT](#)
- [Register for EFT](#) payment method
- eRETR Register of Deeds [Criteria](#) for a completed eRETR Receipt
- [WAMS](#) (Web Access Management System) information | [Sign-up](#)

Paper:

- [Form P-520](#) -- Treasurer's Transmittal (11/04) | [Fill-In Form](#)
- [Pay by EFT](#)
- [Register for EFT](#) payment method
- [Criteria](#) for a Completed Real Estate Transfer Return

Resources

- eRETR [Training/Help](#) -- How to for Filers and Governmental Officials
- Directly send and receive RETR data via [eRETR Web Services](#)
- eRETR [Project](#)
- [Newsletters](#)
- Summary of County Real Estate Transfer Returns Collections: [2005](#) | [2004](#) | [2003](#) | [2002](#) | [2001](#) | [2000](#)
- [Chapter 77](#), Real Estate Transfer Statutes
- [Tax 15, Wis. Adm. Code](#): The Transfer Fee Administrative Tax Code
- [County Register of Deeds](#) addresses, telephone numbers and other information
- Department of Commerce [Rental Weatherization Program](#)
- [Department of Natural Resources](#) Forest Crop Law (FCL) and Managed Forest Law (MFL)

1. Open the transmittal

Note pre-2003 Excel is available. You can not download eRETR, but it can be used instead of having to use an adding machine. File can be e-mailed rather than copied and faxed or mailed.

Follow the same instructions except for the zip and xml files.

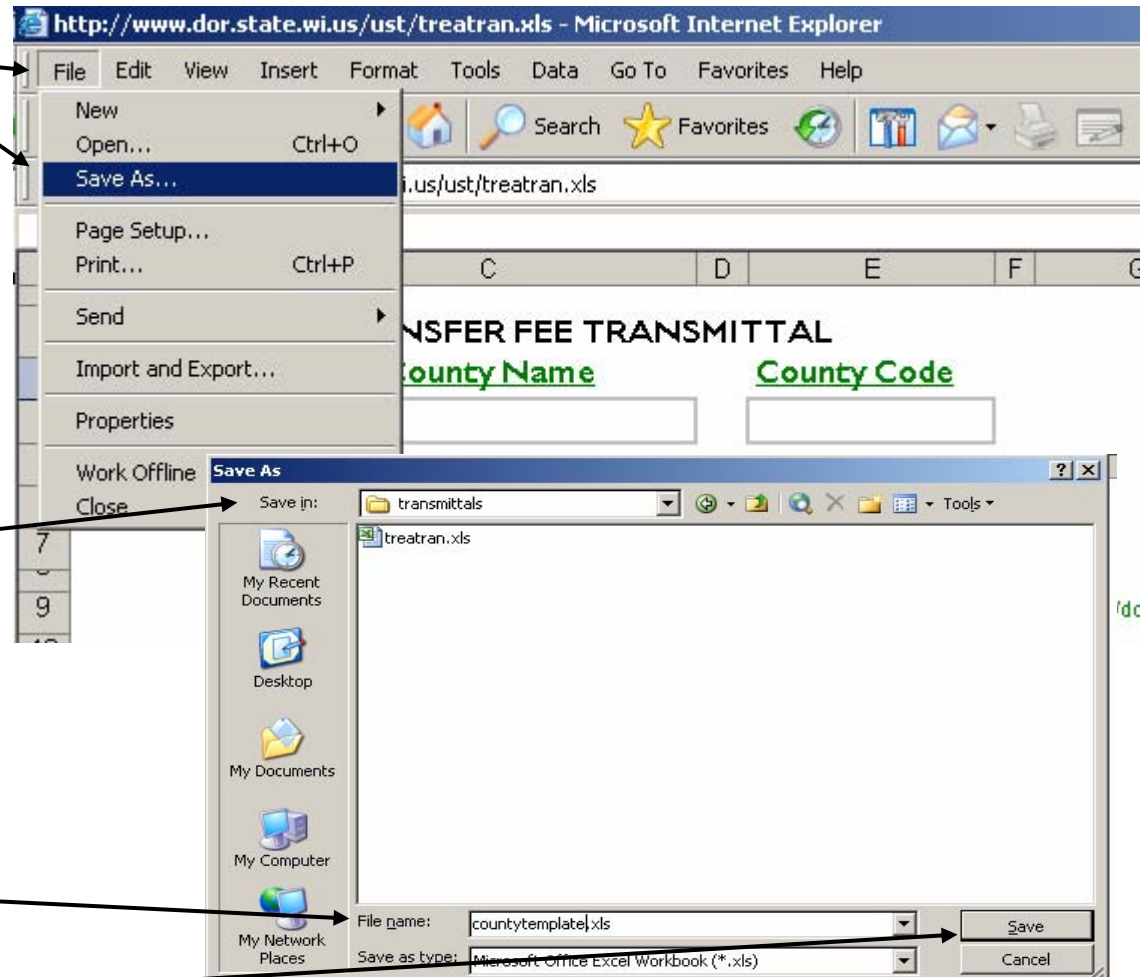
Save the Transmittal as Template

1. Click on File then Save As

2. Select Directory/Folder

3. Select name

4. Save



Open saved template and complete with county information

1. Fill in County Name, Code, Name of Preparer, Title, E-mail and Telephone number

REAL ESTATE TRANSFER FEE TRANSMITTAL

County **County Code** **Reporting collections for**

Beginning number
Ending number
Beginning date recorded
Ending date recorded

	3 MILL PAYMENT	ELECTRONIC	PE-500	TOTALS
1 Number of returns with a fee	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2 Number of returns without a fee	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3 TOTAL RETURNS	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4 Fees collected by COUNTY	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
5 STATE share of fees collected (80%)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
1 MILL PAYMENT				
6 Number of returns with a fee	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
7 Number of returns without a fee	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
8 TOTAL RETURNS	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
9 Fees collected by COUNTY	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
10 STATE share of fees collected (50%)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Adjustments (explain each adjustment)				
11 Total adjustments	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
12 Net due Dept. of Revenue	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total Lines 5+10+11				

Name and address of preparer Title
Signature E-Mail
Date prepared Telephone number, including area code

2. Save as a template for a "master" to use for each month

State law (s. 77.24) requires county treasurers to remit the fees and returns to the department by the 15th day of the month following the close of the month in which the fees were collected.

E-mail this Real Estate Transfer Fee Transmittal (P-520) and spreadsheet to utility@dor.state.wi.us

If paying via Electronic Funds Transfer:

- Transfer funds via account previously set up with bank.

If paying by check:

- Print this page on YELLOW paper (Use Printer Icon on Browser)
(Bank needs a yellow copy for deposit in proper account)
- Remittance for the total amount due the Department of Revenue on Line 12

MAIL TO:

State of Wisconsin
Real Estate Transfer Fee
Drawer Number 387
Milwaukee, WI 53293-0387

Retrieve Monthly eRETR Data

Wisconsin Dept. of Revenue's Real Estate Transfer Web Page

<http://www.dor.state.wi.us/ust/retn.html>

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Real Estate Transfer

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- Use **eRETR** (electronic Real Estate Transfer Return) **Begin a new return or restore a saved file.**
- eRETR Instructions**
- View filed eRETR** (need Receipt No., Value & Name)
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Paper:

- To obtain the paper Form PE-500 either:
 - call (608) 266-1961
 - make a request **online**
 - contact a **Register of Deeds Office**
- Instructions** (PE-500s) for the paper Real Estate Transfer Return (06/05)
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Government

Online:

- eRETR Government Officials web site** - to view or process eRETR
- Treasurer's Transmittal Spreadsheet--Form P-520** (Excel format)
- Treasurer's Transmittal Spreadsheet--Form P-520** (Older versions of Excel)
- Pay by EFT**
- Register for EFT** payment method
- eRETR Register of Deeds **Criteria** for a completed eRETR Receipt
- WAMS** (Web Access Management System) information | **Sign-up**

Paper:

- Form P-520** -- Treasurer's Transmittal (11/04) | **Fill-In Form**
- Pay by EFT**
- Register for EFT** payment method
- Criteria** for a Completed Real Estate Transfer Return

Resources

- eRETR **Training/Help** -- How to for Filers and Governmental Officials
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- Chapter 77**, Real Estate Transfer Statutes
- Tax 15, Wis. Adm. Code**: The Transfer Fee Administrative Tax Code
- County Register of Deeds** addresses, telephone numbers and other information
- Department of Commerce **Rental Weatherization Program**
- Department of Natural Resources** Forest Crop Law (FCL) and Managed Forest Law (MFL)

Click here to get monthly eRETR recordings.

Click here for how to use the transmittal

Opens New Screen

Wisconsin Department of Revenue

Please log In

User ID

Password

WARNING: This system is for authorized users only; system access is monitored. By using this system you expressly consent to this monitoring. Unauthorized use of, or access to, this system may subject you to criminal prosecution and penalties

[Forgot your password? Is your account locked? click here](#)

[Request a Wisconsin User ID and Password.](#)

Retrieve the eRETR Monthly Returns

1. Select Monthly →

2. Select County for monthly total →

3. Select Year →

4. Select Month by clicking on Download →

The image displays four sequential screenshots of the 'Electronic Real Estate Transfer Return' web application, illustrating the steps to retrieve monthly returns. Each screenshot shows the application's header with the title 'Electronic Real Estate Transfer Return' and the 'Department of Revenue' logo. The interface includes a navigation bar with a home icon, 'Help', and 'Quit' links.

Screenshot 1: The 'Welcome Russ Reppen: Equalization' page. It features a 'WELCOME!' message and a list of links: 'View returns by date recorded', 'View returns by date of posting', 'View returns by document ID', and 'View monthly returns'. An arrow points from the text '1. Select Monthly' to the 'View monthly returns' link.

Screenshot 2: The 'Browse history' page. It shows a 'Reselect county' button and a 'Quit' button. Below, the 'Select county or municipality' section lists various locations: '(County)', 'Allouez, Village of', 'Ashwaubenon, Village of', 'Bellevue, Village of', 'De Pere, City of', 'Denmark, Village of', 'Eaton, Town of', 'Glenmore, Town of', 'Green Bay, City of', 'Green Bay, Town of', and 'Hobart, Village of'. An arrow points from the text '2. Select County for monthly total' to this list.

Screenshot 3: The 'Browse history' page. It shows a 'Reselect county' button and a 'Quit' button. Below, the 'Select year' section lists the years: '2004', '2005', and '2006'. An arrow points from the text '3. Select Year' to this list.

Screenshot 4: The 'Browse history' page. It shows a 'Reselect county' button and a 'Quit' button. Below, the 'Select year to date returns or by month' section lists the months: '00 Year-to-date', '09 September', '10 October', '11 November', and '12 December'. Each month has a 'Download' link next to it. An arrow points from the text '4. Select Month by clicking on Download' to the 'Download' link for '12 December'.

The footer of the application shows the 'Wisconsin DOR' logo.

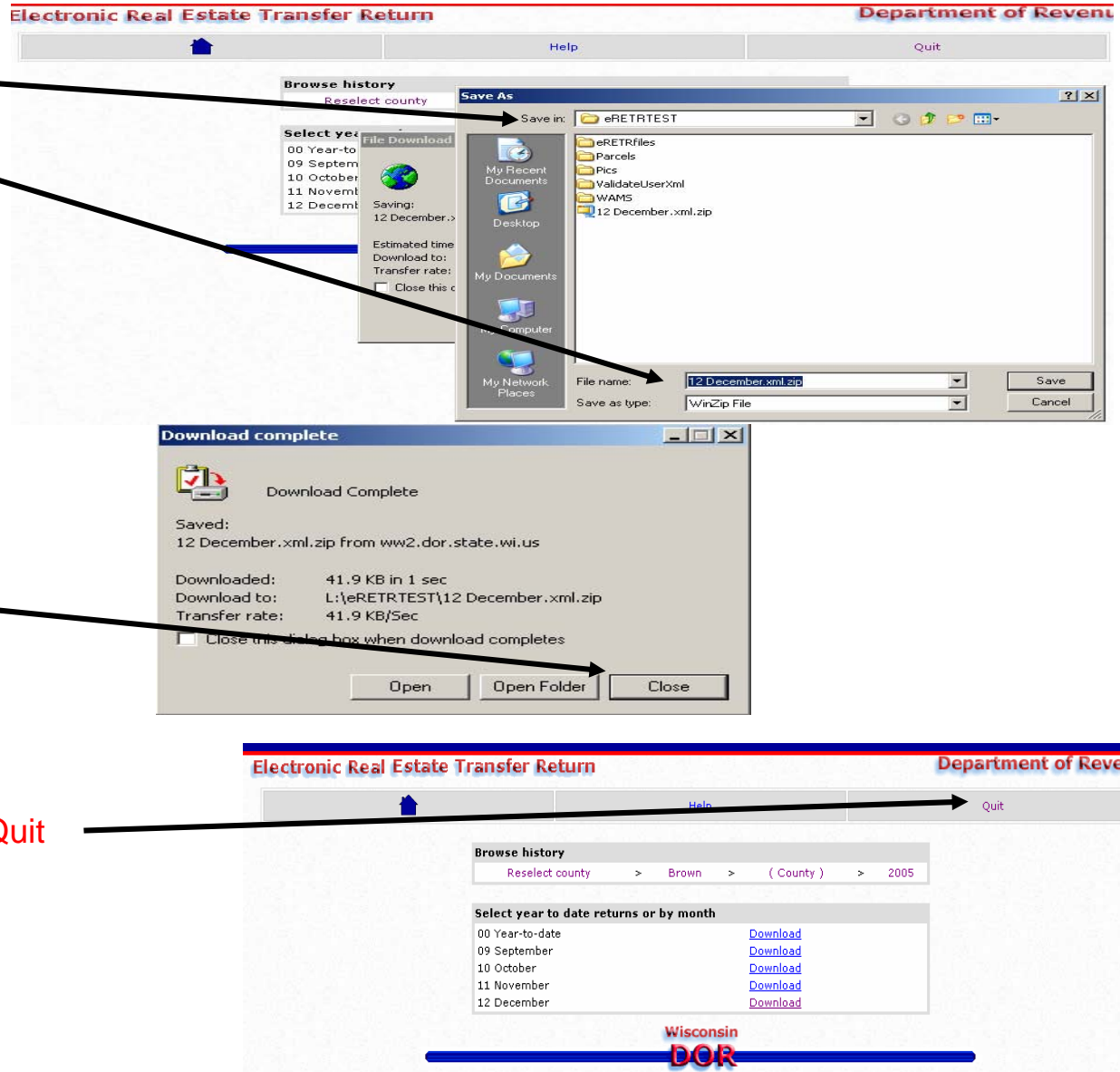
Download Monthly eRETR File

1. Select Directory

2. Save (note name saves as month selected)

3. Download Complete
(New Window) Close

4. Finished with web page: Quit



Open Treasurer's Transmittal Spreadsheet Template in Excel (need Excel 2003 Professional)

In the **Worksheet** page,
click in first cell under
Date Recorded

Microsoft Excel - Treasurer's Transmittal.xls:1

File Edit View Insert Format Tools Data Window Help

Type a question for help

	A	B	C	D	E	H	I	L	M
1	Electronic Real Estate Transfer Summary Section:					Paper Real Estate Transfer Section		Paper Real Estate Transf	
2	(3-mill)					(3-mill)		(1-mill)	
3	DateRecorded	DocumentNumber	TransferFee	ExemptionNumber		Transfer Fee		Transfer Fee	
4									
5									
6									
7									
8									
9									
10									
11									
12									
13									
14									
15									
16									
17									
18									
19									
20									
21									
22									
23	*		0.00	0					
32									
33									
34									

Treasurer Transmittal Worksheet / Transmittal Fee /

Ready

NUM

Locate Zipped File to convert to XML

1. Click on Open button

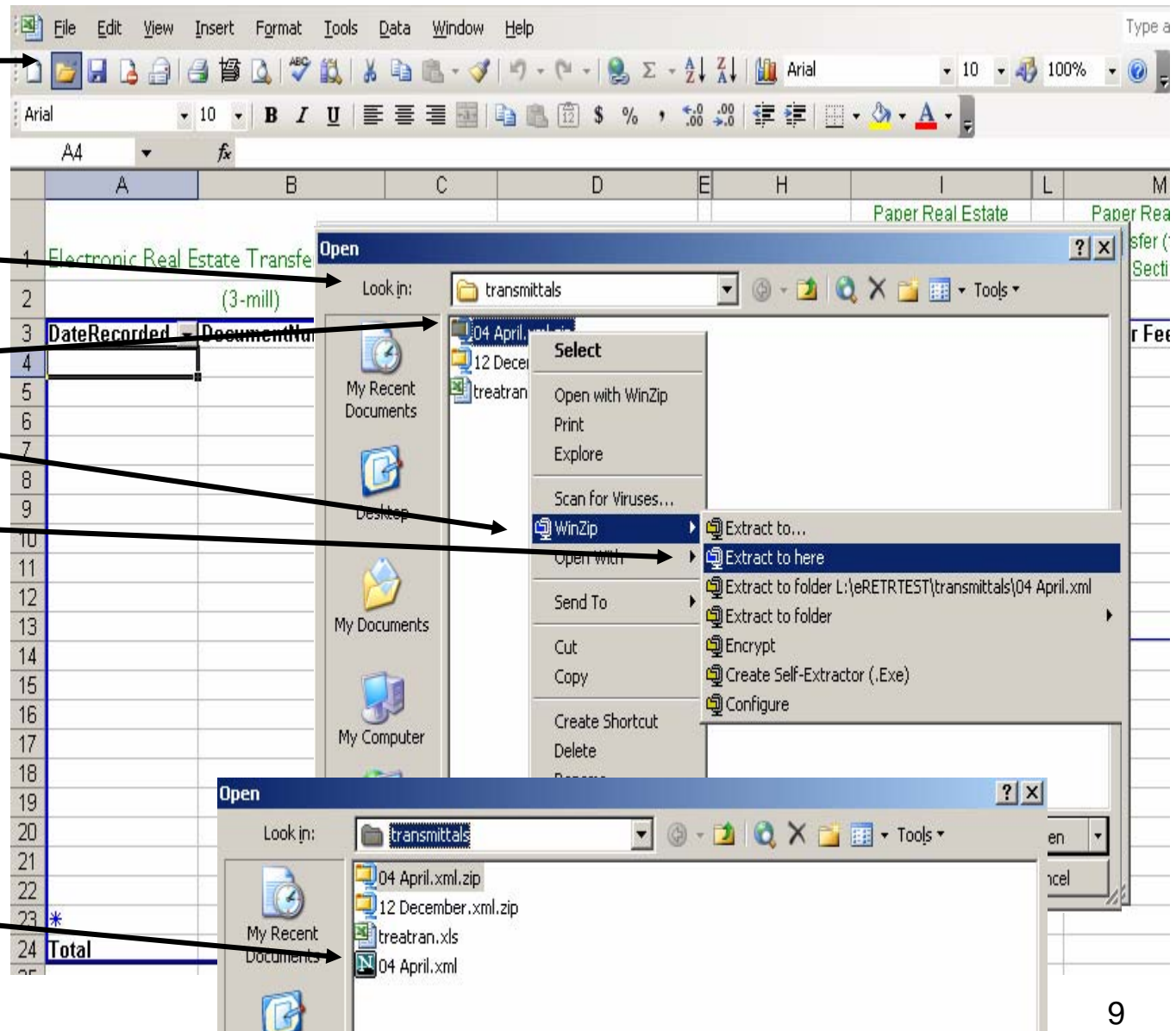
2. Locate folder where zip file was saved

3. Right click on saved ZIPed file

4. Arrow over WinZip

5. Click on Extract to here

File is now saved in the same folder with the same name but now as an xml file instead of xml.zip



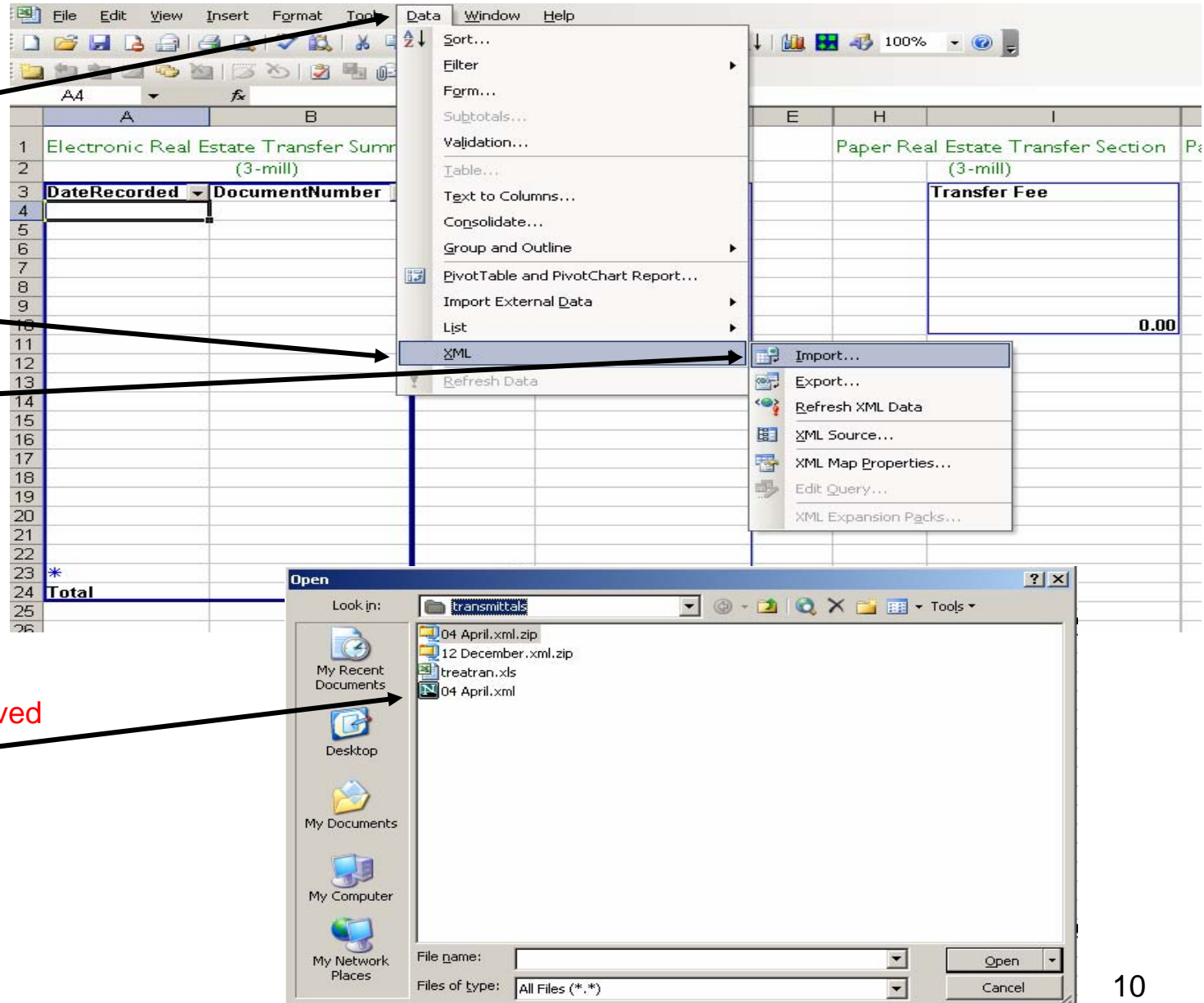
Import XML Monthly File

1. Click on Data

2. Arrow over XML

3. Click on Import

4. Double click on saved monthly XML File



Result of Import to Transmittal Worksheet

[illegible]

Add Green Paper PE-500 to Transmittal Worksheet

	A	B	C	D	E	H	I	L	M
1	Electronic Real Estate Transfer Summary Section:						Paper Real Estate Transfer Section	Paper Real Estate Transfer	
2	(3-mill)						(3-mill)	(1-mill)	
3	DateRecorded	DocumentNumber	TransferFee	ExemptionNumber			Transfer Fee		Transfer Fee
4	9/21/2005	2215633	580.5	* No exemption *			250.00		
5	9/21/2005	2215652	568.5	* No exemption *			500.00		
6	9/23/2005	2216015	162	* No exemption *			325.00		
7	9/22/2005	2215872	765	* No exemption *					
8	9/23/2005	2216092	480	* No exemption *					
9	9/22/2005	2215874	298.5	* No exemption *					
10	9/28/2005	2216975	0	2g - Gift to Gov. Agency			*		0.00
11	9/28/2005	2216972	784.5	* No exemption *			1075.00		
12	9/22/2005	2215870	412.5	* No exemption *					
13	9/28/2005	2216978	585	* No exemption *					
14	9/28/2005	2216743	669	* No exemption *					
15	9/28/2005	2216745	505.2	* No exemption *					
16	9/29/2005	2217029	1194	* No exemption *					
17	9/29/2005	2217031	1140	* No exemption *					
18	9/30/2005	2217397	0	2 - From Gov. Agency					
19	9/30/2005	2217387	660	* No exemption *					
20	9/30/2005	2217393	411	* No exemption *					
21	9/30/2005	2217392	195	* No exemption *					
22	9/30/2005	2217398	258	* No exemption *					
23	Total	19	9,668.70	19					
24									

1. Click on first cell under Transfer Fee for 3-mill or 1-mill payments

2. Enter transfer fees from paper returns.

NOTE: If mailing or faxing, print this worksheet and submit with the transmittal. This will meet the requirement of submitting the adding machine tape.

**Notice everything auto totals

Result to Transmittal Fee

Microsoft Excel - Treasurer's Transmittal.xls:2

File Edit View Insert Format Tools Data Window Help

Type a question for help

Georgia 12 80%

Reply with Changes... End Review...

REAL ESTATE TRANSFER FEE TRANSMITTAL

County Brown **County Code** 05 **Reporting collections for**
September, 2005

Beginning number
 Ending number

Beginning date recorded
 Ending date recorded

	3 MILL PAYMENT	ELECTRONIC	PE-500	TOTALS
1 Number of returns with a fee	17	3	20	
2 Number of returns without a fee	2		2	
3 TOTAL RETURNS	19	3	22	
4 Fees collected by COUNTY	\$9,668.70	\$1,075.00	\$10,743.70	
5 STATE share of fees collected (80%)	\$ 7,734.96	\$ 860.00	\$ 8,594.96	

1 MILL PAYMENT

6 Number of returns with a fee	0	0
7 Number of returns without a fee		0
8 TOTAL RETURNS	0	0
9 Fees collected by COUNTY	\$ -	\$ -
10 STATE share of fees collected (50%)	\$ -	\$ -

Adjustments (explain each adjustment)

11 Total adjustments	\$ -	\$ -	\$ -
12 Net due Dept. of Revenue	\$ 7,734.96	\$ 860.00	\$ 8,594.96

Name and address of preparer Title

Treasurer Transmittal Worksheet Transmittal Fee

1. Complete Document Numbers and Dates

2. DO NOT FORGET to complete the number of paper PE-500 without fees

3. Complete Adjustments if required

Completing Transmittal Fee

1. Complete Treasurer information if not using a template.

(Note that a signature is not required when e-mailing)

2. Follow directions for payment and submitting the transmittal

Information on EFT is on the Real Estate Transfer web page
[Pay by EFT](#)

[Register for EFT](#) payment method

Note that the Transmittal can be saved as a template with this information already completed. See Screen 4.

Microsoft Excel - Treasurer's Transmittal.xls:2

File Edit View Insert Format Tools Data Window Help

80% Gill Sans MT 12

Reply with Changes... End Review...

11	Total adjustments	\$ -	\$ -	\$ - #
12	Net due Dept. of Revenue	\$ 7,734.96	\$ 860.00	\$ 8,594.96

Total Lines 5+10+11

Name and address of preparer

Title

Signature

Date prepared

Telephone number, including area code

State law (§.77.24) requires county treasurers to remit the fees and returns to the department by the 15th day of the month following the close of the month in which the fees were collected.

If paying via Electronic Funds Transfer:

a. E-mail this Real Estate Transfer Fee Transmittal (P-520) and spreadsheet to: utility@dor.state.wi.us

OR fax this Real Estate Transfer Fee Transmittal (P-520) and spreadsheet to: (608) 264-6887

If paying by check:

a. Make a YELLOW copy of the Real Estate Transfer Fee Transmittal (P-520) (Bank needs a yellow copy for deposit in correct account)

b. Remittance for the total amount due the Department of Revenue on Line 12

c. Spreadsheet showing total electronic filings, and sum of dollars collected by the paper returns.

TO:

State of Wisconsin
Real Estate Transfer Fee
Drawer Number 387
Milwaukee, WI 53293-0387

Send the following:

a. Copy of this Real Estate Transfer Fee Transmittal (P-520)

b. The green paper Wisconsin Real Estate Transfer Returns (PE-50)

TO:

Wisconsin Department of Revenue
Equalization Section / Scanning
2135 Rimrock Rd, Mail Stop 6-97
Madison, WI 53713

Retain a copy for your records.

P-520 (R.4-05)

Treasurer Transmittal Worksheet Transmittal Fee

Saving Completed Monthly Transmittal

1. Click on File

2. Save As

3. Any directory you select

4. Name file. Recommend naming it as the month and year the report is for.

5. Save

The screenshot shows the Microsoft Excel interface with the 'File' menu open and 'Save As...' selected. The 'Save As' dialog box is open, showing 'Any directory' selected in the 'Save in:' field. The file name is 'suggest as month/year sept2005' and the 'Save as type' is 'Microsoft Office Excel workbook (*.xls)'. The 'Save' button is highlighted.

Signature	Date prepared	Telephone number, including area code

734.96	\$ 860.00	\$ 8,594.96

Total Lines 5+10+11

E-Mail Transmittal To Revenue

1. Click on E-mail address.

This action opens up your E-mail

Microsoft Excel - Treasurer's Transmittal.xls:2

11	Total adjustments	\$ -	\$ -	\$ -	#
12	Net due Dept. of Revenue	\$ 7,734.96	\$ 860.00	\$ 8,594.96	

Name and address of preparer
 Title
 Signature
 Date prepared
 Telephone number, including area code

State law (6.7724) requires county treasurers to remit the fees and returns to the department by the 15th day of the month following the month in which the fees were collected.

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 Real Estate Transfer Fee
 Drawer Number 387
 Milwaukee, WI 53293-0387

TO: Wisconsin Department of Revenue
 Equalization Section / Scanning
 2135 Rimrock Rd, Mail Stop 6-97
 Madison, WI 53713

Treasurer Transmittal Worksheet Transmittal Fee

2. Add County Name and Month to Subject line

3. Insert saved monthly file

4. Press Send

September Monthly Report - Message (Rich Text)

File Edit View Insert Format Tools Actions Help

Send

To... DOR Utility and Special Taxes

Cc...

Subject: Enter Co. Name and Month

Attachment

File saved as County Name and Date

CONGRATULATIONS!

You have just successfully completed and submitted your Monthly Real Estate Transfer Fee Transmittal.

Thank you for using the eRETR Real Estate Transfer Fee Transmittal.

If you created a Transfer Fee Transmittal template by following Screens 3 and 4, begin the next month on Screen 4.